

STATE BAR OF CALIFORNIA MEMBERSHIP LIST POLICY

- A. Except where otherwise specifically provided herein, the State Bar's membership list consists of names and addresses for all active members of the State Bar, except for those who have requested that their names be deleted from the list.
- B. The list may be provided in electronic form or hard copy to the following entities or individuals for the purposes indicated which hereby are approved by the State Bar as furthering its own public purposes:
 - 1. All State Bar of California approved MCLE providers and providers of MCLE approved activities for purposes of marketing those activities to the members.
 - 2. Underwriters, brokers and administrators of the State Bar approved insurance programs for marketing, billing and claims purposes, and other purposes and duties related to these programs. The list may include inactive members and judges. Date of birth and date of admission may be provided for use in selecting the appropriate type of insurance product a member may be interested in.
 - 3. Local, national and specialty associations of attorneys that are qualified as tax exempt under Section 501(c) of the Internal Revenue Code for solicitation of membership or funds to support the association's activities in furtherance of the State Bar's public purposes. Date of admission may be provided for marketing purposes only.
 - 4. Lawyer referral services that are approved by the State Bar and operated in compliance with the Minimum Standards for a Lawyer Referral Service in California for recruitment and solicitation of funds to support activities in furtherance of the State Bar's public purposes.
 - 5. Legal aid societies that make available free or low cost legal services to the indigent or those of low income, or organizations formed for charitable or other public purposes which furnish legal services to persons in respect to their civil or constitutional rights that are qualified as tax exempt organizations under Section 501(c) of the Internal Revenue Code for solicitation of membership or funds to support activities in furtherance of the State Bar's public purposes.
 - 6. Courts and other government entities.
 - 7. Potential candidates (and designees) for election to the State Bar Board of Governors, for purposes related to the candidacy, provided that the list is limited to active members in good standing, whose principal place of

business is located within the potential candidate's State Bar district and provided that the list is requested no earlier than the date that the Secretary announces the Board of Governors election schedule and no later than the date the eligibility list closes.

8. Candidates for election to the State Bar Board of Governors or the California Young Lawyers Association Board of Directors, for purposes of their candidacy, from the date the eligibility list closes until the last day for voting.
 9. Established publishers of legal directories for purposes of preparing written hard copy or electronic directories who agree to:
 - a. Not engage in the sale of mailing lists or labels;
 - b. Not release the directory or any portion thereof in a form other than the directory format;
 - c. Include a written statement notifying users that use of the information contained therein is limited to the subscriber of the directory; and
 - d. Prohibit reproduction of any portion of the mailing list in any form without the permission of the publisher and the State Bar.
 10. The Foundation of the State Bar of California to aid in matters pertaining to the advancement of the science of jurisprudence or the improvement of the administration of justice and for the solicitation of funds to support activities in furtherance of the State Bar's public purposes. The list provided may include inactive members.
- C. Entities or individuals approved under this policy, wishing to purchase the list must file with the State Bar a signed Agreement for Use of the list and a signed Hold Harmless agreement on forms provided by the State Bar. The Agreement for Use may provide for the multiple use of the list during the effective dates of the agreement.
1. Entities or individuals must also provide, in advance of each request, a written statement of the use to be made of the list and a mock up or copy of each proposed mailing piece for State Bar approval.
 2. Upon approval, the State Bar will fulfill the request and bill the requesting entity or individual according to the current fee schedule for each use of the membership list.

3. The requesting entity or individual must agree to include a designated State Bar staff name and address in all mailings to assure that a copy of items mailed using the list are sent to the State Bar.
- D. At the time of admission, each member of the State Bar shall be advised of this policy and of the purposes for which the member's name and address may be released. At that time, or at any time thereafter, the member may elect to have his or her name deleted from all lists released to outside entities under this policy if the member so chooses. In addition, notice of this policy and the member's right to remove his or her name from the membership lists under this policy, shall be provided to each member in the annual dues statement and other appropriate communications, including the State Bar's Web site and other electronic communications. The notice shall note the simple procedure by which a member may exercise his or her right to prohibit or restrict, at the member's option, the sale or disclosure of member's name and address under this policy.
- E. Requests for exceptions to the terms of this policy shall be referred to the Executive Director of the State Bar or designee if so delegated.

FEE SCHEDULE effective 9/22/98 for Each Use of Membership List

Labels and lists:	4 cents-per name with a minimum of \$40.00 (Gummed / Cheshire /8 ½ x 11 list)
Electronic file:	4 cents per name with a minimum of \$400.00

The cost of providing labels will be added along with mailing costs.